HARVEST AND SALES ESTIMATE - NOVEMBER 2011

WINE PRODUCED	Average % alc/vol 2011	million gross litres							Trend
		2006	2007	2008	2009	2010	Estimate		2012/
							2011	2012	2011
Wine		709.7	730.4	763.3	805.1	779.8	827.5	822.7	99.4
Wine for brandy	11.06	82.1	101.5	86.6	71.4	39.6	34.2	59.4	173.7
Grape juice concentrate and grape juice		73.2	65.2	72.5	34.8	52.1	37.8	43.5	115.2
Distilling wine	9.35	147.9	146.4	166.6	122.1	113.3	104.8	117.8	112.4
Total		**1 013.0**	**1 043.5**	**1 089.0**	**1 033.4**	**984.8**	**1 004.2**	**1 043.4**	**103.9**

WINE MARKET REQUIREMENT	million gross litres							Trend
	2006	2007	2008	2009	2010	Estimate		2012/
						2011	2012	2011
Producer sales to wholesalers: Wine in bulk	407.6	441.3	539.0	508.4	503.2	466.7		
Grapes	71.8	67.2	70.9	71.0	62.8	74.1		
	479.4	**508.5**	**610.0**	**579.4**	**566.0**	**540.8**		
Direct producer sales (packaged wine) and exports	155.4	173.4	200.1	196.5	200.3	206.1		
Total	**634.8**	**681.9**	**810.0**	**775.9**	**766.3**	**746.9**	**770.9**	**103.2**
Wine imported in bulk by wholesalers*	11.3	9.2	11.0	12.3	9.8	13.0	11.0	85.0
Total wine market requirement	**646.1**	**691.1**	**821.1**	**788.3**	**776.1**	**759.8**	**781.9**	**102.9**

* must for sweetening purposes included

WINE PRODUCTION AND SALES	million gross litres							Trend
	2006	2007	2008	2009	2010	Estimate		2012/
						2011	2012	2011
Total wine stock at private and producer cellars on 1 Jan						351.0	406.4	115.8
Wine production	709.7	730.4	763.3	805.1	779.8	827.5	822.7	99.4
Natural wine and must for sweetening imported by private and producer cellars	7.0	3.7	8.0	3.8	0.0	2.4	0.0	
Minus: Sales	634.8	681.9	810.0	775.9	766.3	746.9	770.9	103.2
Transfers (previous vintages)	3.6	10.2	6.1	5.7	5.2	5.2	5.2	100.0
Lees destroyed/shortages	18.2	22.7	23.6	25.9	22.4	22.4	22.4	100.0
Total wine stock at private and producer cellars on 31 Dec	**403.1**	**425.2**	**357.2**	**361.7**	**351.0**	**406.4**	**430.6**	**106.0**
Total wine stock at producer cellars on 31 Dec	278.4	295.4	236.2	232.7	220.1			
Total wine stock at private cellars on 31 Dec	124.6	129.8	121.0	129.0	130.9			

DISTILLING WINE MARKET REQUIREMENT	million litres @ 10% alc/vol							Trend
	2006	2007	2008	2009	2010	Estimate		2012/
						2011	2012	2011
Ex industry (current and previous vintages)	148.5	154.6	168.0	129.7	115.5	104.0	116.0	111.5
Ex import (current year)	31.1	39.6	10.4	4.1	20.3	58.0	35.0	60.3
Ex import (previous year)	10.0	-						
Ex pool	1.4	0.04	0.46	0.02	0.02	0.02	0.02	100.0
Total	**191.0**	**194.2**	**178.8**	**133.8**	**135.8**	**162.0**	**151.0**	**93.2**
Pool deliveries	1.4	0.04	0.46	0.02	0.02	0.02	0.02	100.0
Ex import (destined for following year's market requirement)								